HOW TO USE THIS TEMPLATE

# Commission Check List

### WHAT IT IS

A pre-payment checklist that confirms every piece of a job file is complete — CRM entries, job photos, correspondence and contract — before a commission request is paid.

### WHO USES IT

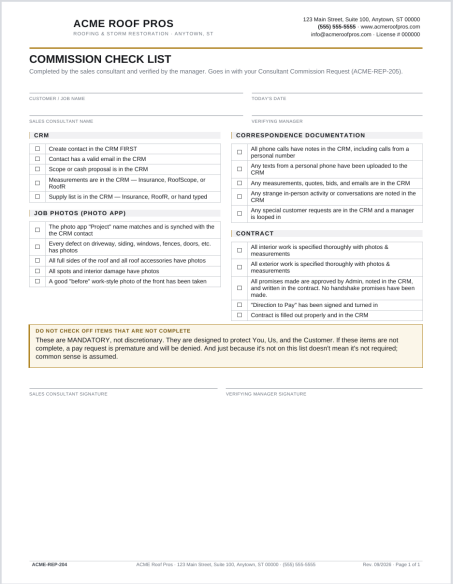
Completed by the sales consultant and verified by a manager.

### WHEN TO USE IT

Right before submitting a Commission Request for a job; attach it to the request.

## Step by step

1. Enter the customer/job name, date, consultant and verifying manager.
2. Work through each section (CRM, Job Photos, Correspondence, Contract) and tick only the items that are truly done.
3. Fix anything missing before you submit — incomplete files are the #1 cause of payment delays.
4. Consultant signs; manager verifies each box against the file and signs.
5. Staple it to the Commission Request Form and submit.



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COMMISSION CHECK LIST

Completed by the sales consultant and verified by the manager. Goes in with your Consultant Commission Request (ACME-REP-205).

CUSTOMER / JOB NAME | TODAY'S DATE

SALES CONSULTANT NAME | VERIFYING MANAGER

CRM

- ☐ Create contact in the CRM FIRST
- ☐ Contact has a valid email in the CRM
- ☐ Scope or cash proposal is in the CRM
- ☐ Measurements are in the CRM — Insurance, RoofScope, or RoofR
- ☐ Supply list is in the CRM — Insurance, RoofR, or hand typed

JOB PHOTOS (PHOTO APP)

- ☐ The photo app "Project" name matches and is synched with the the CRM contact
- ☐ Every defect on driveway, siding, windows, fences, doors, etc. has photos
- ☐ All full sides of the roof and all roof accessories have photos
- ☐ All spots and interior damage have photos
- ☐ A good "before" work-style photo of the front has been taken

CORRESPONDENCE DOCUMENTATION

- ☐ All phone calls have notes in the CRM, including calls from a personal number
- ☐ Any texts from a personal phone have been uploaded to the CRM
- ☐ Any measurements, quotes, bids, and emails are in the CRM
- ☐ Any strange in-person activity or conversations are noted in the CRM
- ☐ Any special customer requests are in the CRM and a manager is looped in

CONTRACT

- ☐ All interior work is specified thoroughly with photos & measurements
- ☐ All exterior work is specified thoroughly with photos & measurements
- ☐ All promises made are approved by Admin, noted in the CRM, and written in the contract. No handshake promises have been made.
- ☐ "Direction to Pay" has been signed and turned in
- ☐ Contract is filled out properly and in the CRM

DO NOT CHECK OFF ITEMS THAT ARE NOT COMPLETE

These are MANDATORY, not discretionary. They are designed to protect You, Us, and the Customer. If these items are not complete, a pay request is premature and will be denied. And just because it's not on this list doesn't mean it's not required; common sense is assumed.

SALES CONSULTANT SIGNATURE | VERIFYING MANAGER SIGNATURE

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Page 1 preview of the editable Word template (1 page).

### WHAT'S INCLUDED

- ✓ Editable Word (.docx)
- ✓ This how-to guide (PDF)
- ✓ Real text & tables — no images to trace
- ✓ Prints on US Letter

## Tips from the field

- Don't check off items that aren't complete — the manager will verify.
- Rename the CRM / photo-app sections to match the software your company actually uses.
- Use it as a training tool: new reps learn what a 'complete file' looks like.

## Customize it with your company name & logo

1. Add your logo: open the .docx in Microsoft Word, double-click the header and use **Insert › Pictures** to place your logo at the left. Keep it about 0.5–0.7" tall.
2. Replace the sample company details: press **Ctrl+H** (Find & Replace) and replace **ACME Roof Pros**, **123 Main Street, Suite 100**, **Anytown, ST 00000**, **(555) 555-5555**, **info@acmeroofpros.com**, **www.acmeroofpros.com** and **License # 000000** with your own. Check the header and footer too.
3. Match your brand: select text and change the font or color, or edit the Heading styles once to update the whole document. Tables and fill-in lines are real Word tables, so rows can be added or removed.
4. Save a master copy as a Word Template (**File › Save As › Word Template (.dotx)**) so every new copy starts clean, then **File › Export › PDF** for a print-ready or email-ready version.

All names, addresses, phone numbers and figures shown in the template (ACME Roof Pros, John Doe, Jane Smith, 123 Main Street, (555) 555-5555, etc.) are fictitious placeholders for you to replace.